Integrating Collection Manager's WorldCat cataloging partner collections into your GOBI workflow

Presentation summary

Charles Hillen, Director of Library Technical Services, GOBI Library Solutions, provided an overview on the WorldCat cataloging partners (WCP) collections in WorldShare Collection Manager. GOBI provides the technical specifications needed to create this service. The process of WCP begins with orders being placed in GOBI, e-order from your ILS, or GOBI assigns an item picked from stock based on your approval profile. Items ordered are then picked up and GOBI transmits title and order information to OCLC. OCLC finds the record in WorldCat and delivers spine label data to GOBI. GOBI prints the spine label and has the items processed based on the specifications of the library. OCLC then sets holdings in WorldCat, including GOBI order information and spine label data. OCLC also prepares the record file for delivery to the library. The customer can then retrieve the MARC record file from WorldShare Metadata My Files. For Collection Manager to work more effectively, libraries should work with GOBI to determine if one profile or several are needed. Deciding how to configure your profiles is based on several factors like fund code, location code, and subaccounts. GOBIs Technical Specifications document contains an outline for service choices and parameters that are used to configure services. Whenever you have issues with your cataloging partner collections, it's important to always contact GOBI first before contacting OCLC, since the record and spine label delivery process starts there.

Shannon Burke, Coordinator of Monograph and Automated Acquisitions, Texas A&M University (TAMU) Libraries, discussed how their library is using Collection Manager with GOBI to manage records for print orders. TAMU workflow begins with the orders for print books though GOBI, GOBI sends a manifest to Collection Manager, and then Collection Manager generates the records weekly. While this is happening, Collection Manager is generating records for TAMU and spine labels/print files for GOBI. GOBI then completes the physical processing, invoicing, and ships the books. TAMU finally receives the records and books. There were many considerations when deciding the GOBI accounts such as the acquisition method, locations, priority, format, and funds. Once it decided how to categorize the profile, they can be correlated with Collection Manager to fit the needs of the library. The records are delivered weekly by Collection Manager. MARC records for these files can contain local information for the library such as GOBI invoice number and library barcode which permits bulk changes if needed. These records can then be loaded to the ILS, where the library is creates holdings, items, and purchase orders for each of the items.

Kim Wiljanen, Library Assistant, Michigan State University (MSU), discussed their workflow using Collection Manager and GOBI to help reduce the backlog of books and speed up the processing of materials. GOBI helps MSU by obtaining the books, sends the book and pricing information to Collection Manager, and handling the physical processing. The library worked with GOBI for certain customizations such as creating profiles and selecting the books for their blanket order plans, keeping track of the different plans using sub-accounts, creating individual invoices for sub-accounts, and creating separate invoice for the physical processing. WorldShare Collection Manager on the other

hand received the information regarding the shipment from GOBI, selected the records, returned the labeling information to GOBI, created bibliographic record files, and posted the files for download from their website. Customizations were done both in Collection Manager and GOBI based on parameters set by MSU. Some of the problems that could be seen with the bibliographic records sent would be no records available, incorrect records due to duplicate ISBN, and eBook records supplied for print books. Even with these small issues the partnership with GOBI and OCLC allow the library to improve efficiency and reduce backlogs.

Member Questions

Question: What if you receive a processed book with missing pages or other errors in it, such as type missing or slanted? Can you return for a replacement processed book?

Answer: Yes, if a book is defected, it is returnable. You would go through your representative at GOBI and let them know. They usually allow returns.

Question: Can you expand a bit on what sort of cataloging review is done on delivered books and MARC records? Is every book and record reviewed?

Answer: In TAMU every book is reviewed. We check for basic information such as the title being correct and that we receive the print description rather than the ebook. We want to make sure that the record is displaying properly. We also have a lot of books that do not come from GOBI which are cataloged in-house.

Question: Why do you put invoice numbers in the bib record and not in an order record?

Answer: TAMU uses it to make sure the records are loaded correctly into our ILS system.

Question: How are the books processed?

Answer: GOBI offers several standard physical processing activities, such as security supplies (e.g. strips or RDF tags). GOBI can do barcode scanning and add protectors to spine labels and barcodes. Other processing can be done based on your library needs.

Question: Do you accept book donations? If so, how does your workflow incorporate them?

Answer: MSU does receive book donations. They have their own workflow. We double check to make sure we do not have them already in the catalog and check with bibliographers to see if they want it added to the catalog. We then catalog them and get them out to our shelves.

Question: Who establishes the initial CM settings or modifies CM settings in an established workflow if need be? the Library or GOBI?

Answer: The library is in control of the profile in Collection Manager. Those collections are done by the library in that system. It is recommended though that if a library makes changes in Collection Manager to notify GOBI of those changes.

Question: What percent of your books do you receive subpar bibliographic records?

Answer: MSU has not necessary figured that out at a percentage basis, it's probably 20 to 25%. About 75% of records do not need to go to catalogers for additional work. It really depends on how new the book is at times is.

Question: Do you have any ballpark figures for the small number of shelf-ready books received that might require re-processing, e.g., a selector requests another location or re-classification etc.?

Answer: TAMU doesn't have exact numbers on this but it would be low. The main things that we correct were mentioned in MSU's presentation. Also, it depends on the level of service you sign up with GOBI.

For MSU, its quite a low number of requests to have things reclassified, possibly 5 to 6 in the past couple of years. Sometimes a label is not available at the time of the book being sent, but once the library has received the book there may be a more completed record in WorldCat. This happens very little though.

Question: Does GOBI use the same process for UK books?

Answer: Yes, it is and has been established for quite some time.

Question: Does GOBI or WCP provide an order record to load so patrons can place holds?

Answer: Collection Manager provides a bibliographic record from WorldCat. The record can be customized to include order information as defined by the library, based on the data that GOBI is able to send to OCLC.

Question: Can you tell us the geographical parameters of your shelf-ready GOBI plans? i.e. for which countries/continents do you use this service?

Answer: GOBI offers shelf-ready services to all customers, world-wide. You can learn more about GOBI and send queries to their team via the GOBI web page.

Question: How do you find incomplete records that are loaded in your catalog?

Answer: TAMU: Just a caveat that the quality of record is tied to the type of records we are using, completed automated. I know that if we were to go with OCLC Plus records, the quality would be enhanced.
- Once in the System:
  - We run two reports, a new bookshelf report and an in-process report, regularly to watch for missing call numbers or obviously incorrect ones or lingering titles with a status of in-process.
- Upon arrival:
  - Because we also receive physical processing, when a book arrives with no call number spine label, this is a giveaway, that the record will need some attention.
  - In addition, a quick of review of the marc file as we loaded it into our system, using marc edit:
    - This gives us the number of records compared to the number of 050s
    - A quick Ctrl-F of the 050 field can help identify records with missing 050s
    - A quick Ctrl-F of the 245 field can help identify records with a title in all caps
      - There may be other fields of concern but call number and title catch the majority of problems.

Question: How about the authority works?

Answer**:** TAMU: The authority control work is beyond my department.